Resource Partner Capacity
SCORE Chapter 10, San Francisco
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SCORE is a non-profit (501c3) headquartered in Washington D.C.
We are supported by and are a Resource Partner of the Small Business Administration (SBA).
Our Mission: Foster vibrant small business communities through mentoring and education
Our Vision: Every person has the support necessary to thrive as a small business.
Our Nationwide Goal: Help 1 Million Clients by 2020
Our Values:

        Small Business Matters
        Giving Back Matters
        Volunteers Matter
        Experience Matters
        Relationships Matter
        Diversity Matters
        Lifelong Learning Matters

There are over 300 SCORE chapters located throughout the United States where approximately 13,000 volunteers deliver our services to clients in the pre-venture, startup or existing business phase. Our primary service is free individual mentoring delivered either face-to-face or online via telephone, Skype or Email. In addition, we offer workshops, seminars and round tables on all small business related issues.

Having been in existence for over 50 years has given our organization a solid foundation of business development and operational experiences over a variety of economic conditions. As seasoned veterans, many of our mentor volunteers have had exposure to the concepts of "Lean" business development concepts either through real life experience, online learning or texts. We apply these concepts when and where appropriate during free one-on-one mentoring sessions, or workshops and seminars.

Background of Representatives for I-Corp Training
Candidate #1: Ron Schmidt has been a SCORE mentor for over ten years and worked with over 1,000 clients at various stages of business development. He has taught various business subjects in seminars and workshops both at SCORE, Chambers of Commerce, and other entities. Undergraduate work at Valparaiso University and post-graduate work at Marquette University. He is a licensed Professional Engineer in the State of California. Retired 15 years after a career including international experiences, he has completed over 36 business courses using both Coursera and Udacity online education platforms. He understands the "Lean" business concepts and uses the business canvas model extensively.

Candidate #2: Don Weil has been a SCORE mentor for over five years and is active in the Angel Investing area. He belongs to two highly respected angel groups and has developed and delivered three workshops on the subject of raising money.   Don is a graduate of the US Naval Academy and the Harvard Graduate School of Business (HBS). He has owned and operated six companies with up to 150 employees and ran another one after his retirement.

Rational for I-Corp Training

Audience - Response: SCORE Chapters interact with a broadly diversified client base from a variety of businesses and industries. In our San Francisco Bay Area territory, there are significant opportunities to support meaningful pre-venture, startup, and existing businesses that are not necessarily technology focused.

Over the last five years, our chapter has averaged over 4,400 encounters per year.

> Examples of recent encounters:
> Businesses: Product design and manufacturing, retail product sales, business consulting, construction contracting, health and human services, facility services, food services, restaurants, etc.
> Business Status: Pre-Venture 56%, Start-Up 18%, and Existing 26%

Currently our client base expands and contracts based on economic and/or job growth market conditions. Limited investigation and anecdotal evidence suggests an element of dissatisfaction with our deliverables. This is reflected in our low follow-on rates. It appears our clients (+95% employed) find our services less than responsive to their needs, offer less than expected free mentoring and timely education, and operate for our convenience, at our locations. This has resulted in a gradual decline in number of clients. With few exceptions, such as free mentoring at outlying libraries and Chambers of Commerce, we function with the attitude of "let the clients come to us". It is the exception when we provide evening or weekend services. Our location, although centrally located with very good local public transportation, makes it difficult for our clients to maximize their appointment times due to high parking costs, congestion, and movement into and out of downtown San Francisco. Adding a "Lean" business concept approach to our product offerings delivered in a more efficient manner will have a positive impact on both our individual mentoring and our workshops and seminars, and will enhance the learning experience.

We operate with a services delivery framework that lacks consistency. Opportunities to deliver latest "Lean" business startup thinking through our services delivery systems could abound, especially if using up-to-date technologies for support.

Adaptation - Response: Having two well-trained instructors in our Bay area market will provide our counseling cadre with the latest educational tools to effectively teach our client base and mentors those processes that will offer them opportunities for success. Viewing current "success rates" would indicate there are as many failures as successes. This can be corrected using platforms built on solid mentoring techniques and the best educational tools available. Currently our clients are not afforded the latest tools to develop their businesses using "lean" business methodologies. Implementation of this new thinking may cause an initial reduction in client numbers, but a much higher rate of success for those remaining. The additional benefit of providing our counseling core with these concepts will be renewed confidence in their abilities and increases in performance.

Project Adaptation References
Business Model Generation – *Alexander Osterwalder and Yves Pigneur*
The Startup Owners Manual – *Steve Blank and Bob Dorf*
The Lean Startup – *Eric Ries*
Running Lean – *Ash Maurya*
Udacity – www.udacity.com
Coursera – https://www. **Coursera.org**

Implementation - Response: We <u>must create a new paradigm</u>. We must focus on the clients and their understanding of "Lean" business concepts. We must rethink the processes related to delivering our services – be they one-on-one free mentoring or workshops. We must create a method to better vet our clients to find those with the ambition and capabilities needed to achieve the goals of true entrepreneurship. In addition, we need to provide for those of our clients that require only limited attention by utilizing our resources more efficiently for this group.

Our mentors are looking for ways to overcome the lack of challenges and opportunities for their clients' success and their own professional development. We must encourage better communication and follow-up with clients while continuing to convey professional attitudes. This project will provide a framework for our mentors to learn from and follow the concepts of "Lean" Business. This, in turn, will migrate to our clients and engage them to stretch for their goals.

With a renewed interest in "Lean" Business and focus on client satisfaction and success, we can improve our deliverables and organize events for the convenience of our clients as common practice. Using the latest technologies and communications techniques we will deliver effective, efficient and economical results.

Metrics to evaluate the project will include:
- Increased number of viable clients
- Increased results in clients' evaluation ratings
- Increased number of workshops
- Increased number of workshop attendees
- Increased number of fully trained mentors

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Lean for Main Street Training Challenge
SCORE Chapter 10 Project: SCORE 2.0

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Concept
Develop an offering for SCORE chapters built around the "Lean Canvas Business Model". The nine segments of the model to be the building blocks for 1) internal training and development of product/service offerings, and mentor development, and 2) client training and support for three primary market segment stages; pre-venture, startup, and existing.

Project Overview
- Provide a consistent approach to helping our clients attain goals.
- Build from existing and freely available resources.
- Use San Francisco Chapter 10 as pilot for project.
- Use the "Lean Canvas Business Model" as platform.
- Use Udacity's "How to Build a Startup" as the primary teaching aid.
- Build the program based on the nine segments of the model.
- Supplement with materials available from Massive Open Online Courses (MOOC) such as Coursera.
- Create customized training programs unique for each of the three client segments or for individual clients, as necessary.
- Immerse dedicated team of SCORE 2.0 counselors in process.
- Develop in-house capabilities for each of the nine model sections. These capabilities will be available for traditional SCORE clients.
- Develop a vetting process to assure qualified, committed clients.